We Connect the Systems that Power Education®

Edustructures Student Locator

Overview Guide

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Contents

1. Introduction

The Edustructures Student Locator Overview manual is provided to help you better understand Student Locator and some of its features. It also provides step-by-step instructions for common tasks in Student Locator, like synchronizing with SIF Zones and manually requesting State IDs. This manual is divided into five sections:

a. An Overview Section — Provides an overview of the SIF infrastructure as it pertains to Student Locator.

b. Getting Started Section — Provides step-by-step instructions to get you going with Student Locator.

c. Reference Section — Provides comprehensive information for each screen and menu you will be using in Student Locator.

d. “How to” section — Provides step-by-step instructions for common tasks in Student Locator.

e. Advanced section — Provides information for more advanced options.

2. Student Locator Overview

The purpose of the Edustructures Student Locator is to obtain students’ State IDs from the State’s ID Management System and then update the local student information system (SIS). This is done automatically as students are added to the district or school SIS. You can also obtain State IDs manually after synchronizing the Student Locator Agent with SIF zones.

There are several required components for Student Locator to function:

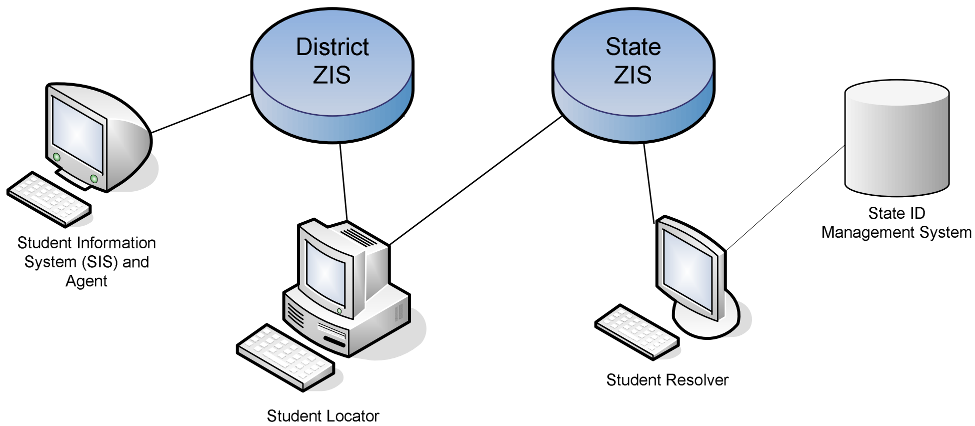
- A student information system (SIS). Some examples of an SIS are Pearson’s SASI and PowerSchool applications. (Student Locator works with any SIS that supports the Schools Interoperability Framework 1.5 and earlier.)

- An SIS SIF Agent and a Zone Integration Server such as the Edustructures SIFWorks® Enterprise ZIS.

- Student Locator Agent

- Student Resolver Agent

All of these components are connected to allow the Student Locator to do its job of obtaining State IDs. The next few pages will demonstrate briefly how Student Locator works.

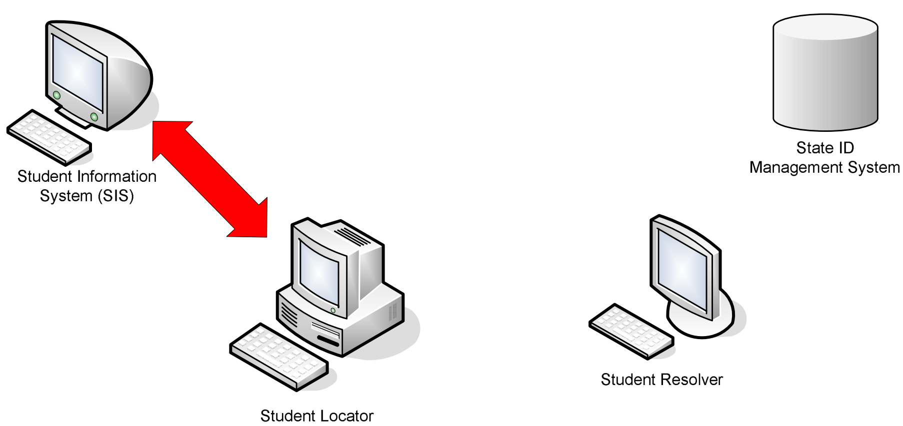


How it works

When you open the Student Locator Agent's Console for the first time, there is no student information in the Student Locator Agent's database. For the Student Locator Agent to do its job, it needs student information from the district student information system (SIS). To get this information, it needs to "synchronize" with the SIS. (See Synchronizing Student Locator on page 10 for more information.)

> Note: The Students view displays without districts or students listed the first time the Student Locator Console is opened.

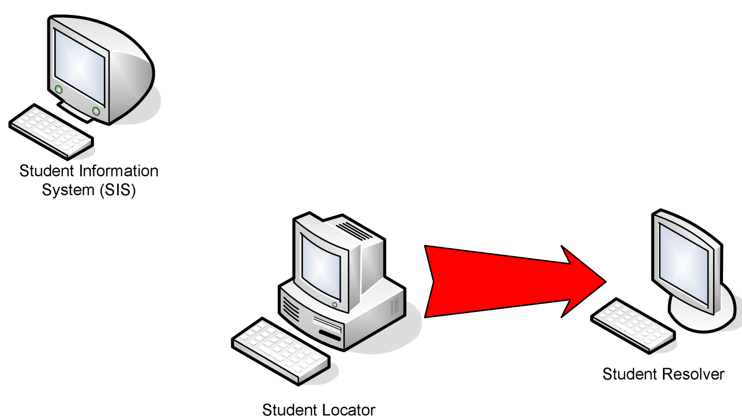
When the Student Locator Agent synchronizes with the SIS, demographic and enrollment information for all students is copied into the Student Locator Agent's database.



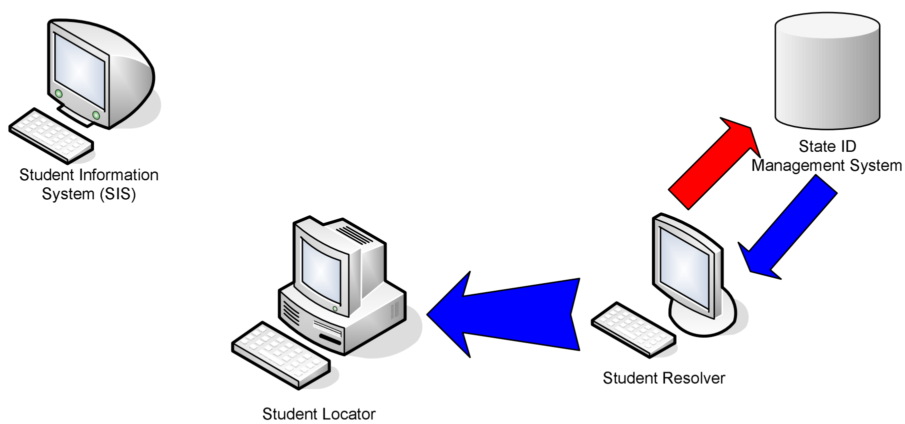
After the synchronization is complete, the Student Locator Agent is ready to request State IDs.

> Note: There are two ways that the Student Locator Agent requests State IDs, manually and automatically. (See Requesting a State ID on page 12 for more information.) Manual requests are "user-driven" meaning initiated by you. Automatic requests are "event-driven" meaning initiated by certain SIF events from the SIS.

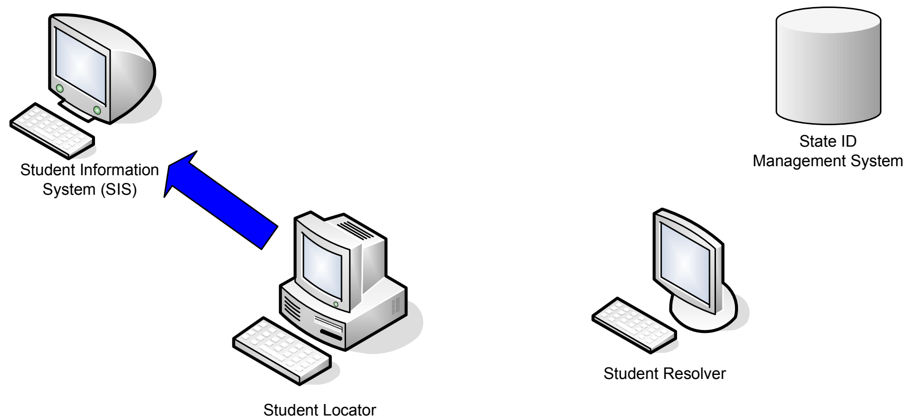
As the Student Locator Agent requests State IDs, the Student Resolver Agent listens for those State ID requests.



After the Student Resolver Agent receives the requests from the Student Locator Agent, the Student Resolver Agent passes the student information to the State ID Management System and waits for the State to assign State IDs. After State IDs have been assigned, those IDs are passed back by the Student Resolver Agent to the Student Locator Agent, which adds the State ID to the student's information recorded in its own database.



The Student Locator Agent then passes the State ID back to the SIS.



3. Getting Started

Now that you understand how it all works, you can get started.

The Student Locator Agent should have already been installed and configured for your district. However, there are a few things you will need to do before the Student Locator Agent can obtain State IDs for your students.

The Agent and the Console

There are two components installed at your district as part of the Student Locator Framework—the Student Locator Agent and the Student Locator Console.

The Agent is the program that does the actual work of communicating with other software systems via SIF. The Agent has no user interface and runs “in the background” largely unseen. (For the technically inclined, the Agent is usually installed on Windows as a “Service” that starts automatically at boot time, and on the Macintosh as a “Login Item” that starts automatically when the administrative user logs in).

The Console is the program that gives you a window, menus and toolbars to work with the data stored by the Agent. The Console lets you administer the Agent and change its configuration. On all types of computers, the Console is an application program that you run when you need it, just like any other program.

Nearly all of the instructions in the rest of this Guide assume you are working with the Console.

Accessing the Student Locator Console

Before you can open the Student Locator Console, you need to activate it. Steps for activating the Student Locator Console vary depending on whether you are using Windows or Macintosh (Mac) and will be described below.

To activate the Console on a Mac:

1. Open the folder /Applications/SLFLocator.

2. Double-click the application called Student Locator Console (it may be called "Student Locator Console.app" depending on your Finder settings).

3. The Student Locator icon appears in the Dock.

> Note: When the Student Locator icon first appears in the Dock after activating, the icon "blinks out" and then reappears.

To activate the Console in Windows:

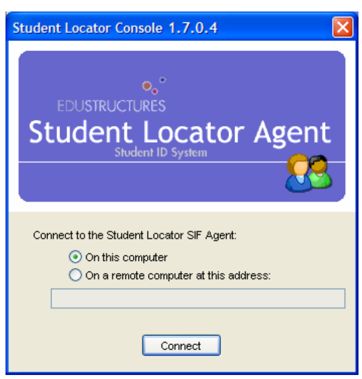
1. Click the **Start Menu > Edustructures > Student Locator > Student Locator Console**.

   Note: If the Student Locator Console is not located in the Start Menu, double-click the "Student Locator Console" in the C:\SIFAgents\Edustructures\SLFLocator\ folder.

2. The Student Locator icon is placed in the Window's toobar.

To open the Console:

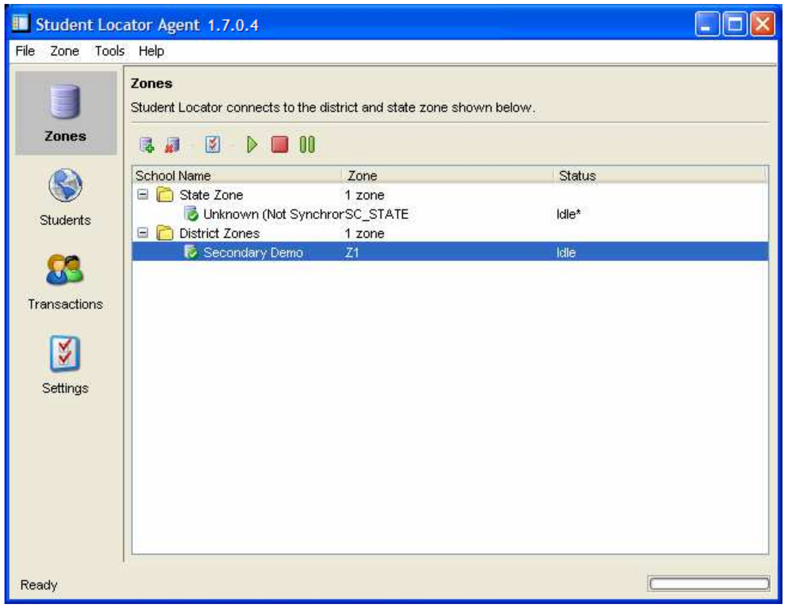
1. Once the Console is active, click the Student Locator icon ( ). In Windows, the Student Locator icon is located on the toolbar in the bottom-right of the Desktop. On a Mac, the Student Locator icon is located in the Dock.



> Note: If the agent does not start, you may need to start the service. For more information on starting a service, see Start and Stop a Service in the Troubleshooting section on page 28.

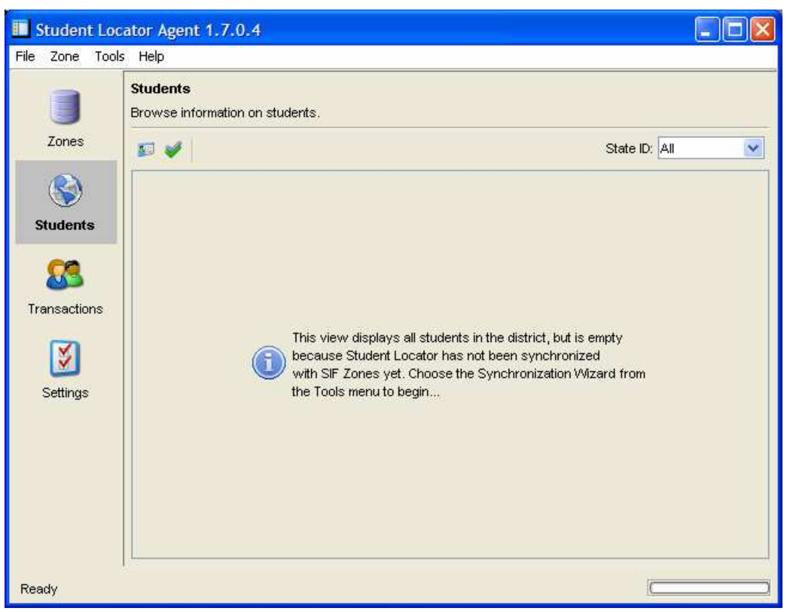
2. Verify that "**On this computer**" is selected or, if accessing remotely, click "**On a remote computer at this address**" and enter the IP address of the computer on which Student Locator is running.

3. Click **Connect**.



Note: For complete information on Student Locator, go to the Reference section on page 13.

4. Click **Students** from the left menu.



The Students view displays without districts or students listed the first time the Student Locator Console is opened. In order to populate the view, the Student Locator Agent needs to be "synchronized" with your Student Information System (SIS).

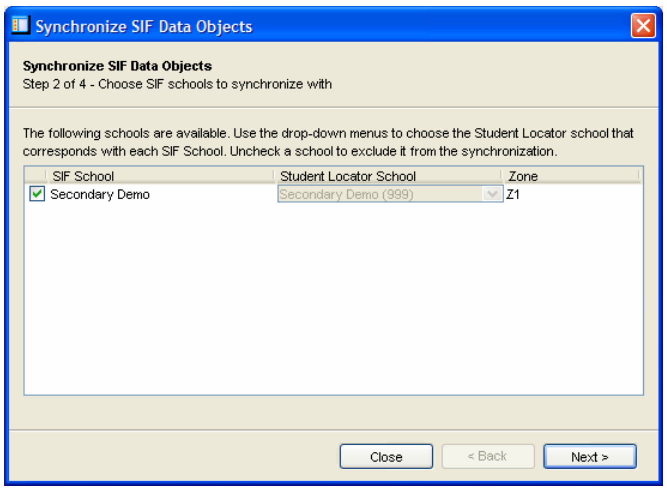
Synchronizing Student Locator

Synchronization is accomplished through the Synchronization Wizard. Running the Synchronization Wizard collects all of the student information from the SIS and places that information into the Student Locator's database.

To Synchronize:

1. Click **Tools > Synchronize…**.

2. Click **Next**.

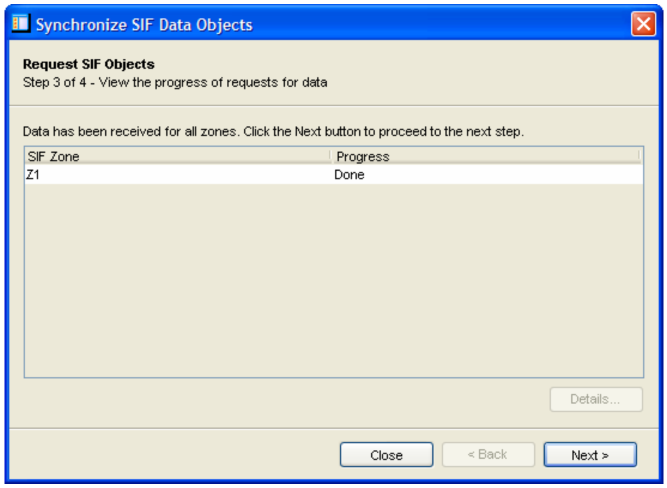


3. All of the available schools will display in this window. Check the schools with which you want to synchronize and click **Next**.

Note: On an initial setup, synchronizing with all zones and schools is required to populate Student Locator. Student Locator cannot request State IDs without student information.

4. Confirm your data request and click **Yes**.

Depending on the number of schools synchronizing with Student Locator, this may take a few minutes. The progress is measured for each zone in the Progress column.

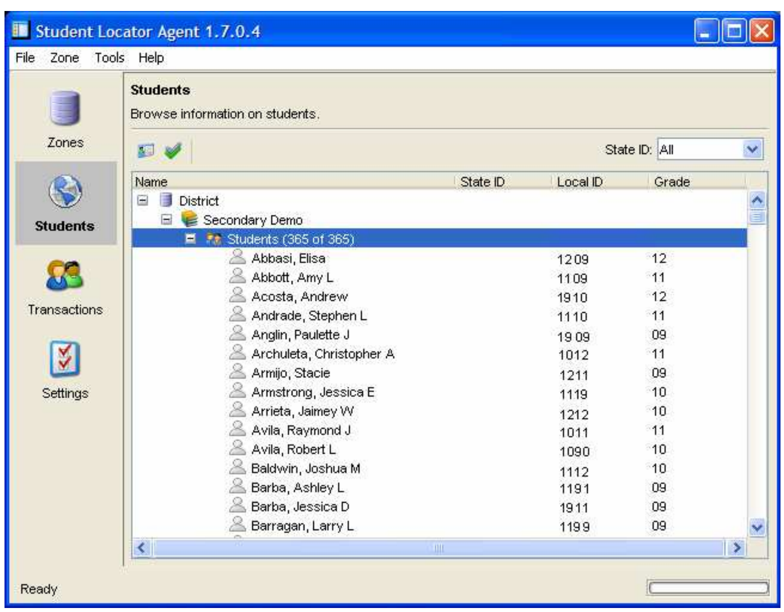


5. When the Synchronization wizard completes all of the zones and displays “Done” in the Progress column, click **Next**.

6. Click **Finish** to commit your changes and close the Synchronization Wizard.

Note: You can close the Synchronization Wizard at anytime; however the synchronization continues until it is finished.

The Student view is now populated with the necessary information from the SIS. Information is sorted by District, School, and Student. After the initial synchronization is complete, the Student Locator Agent will keep its database up-to-date by subscribing to all SIF Events reported by the SIS.



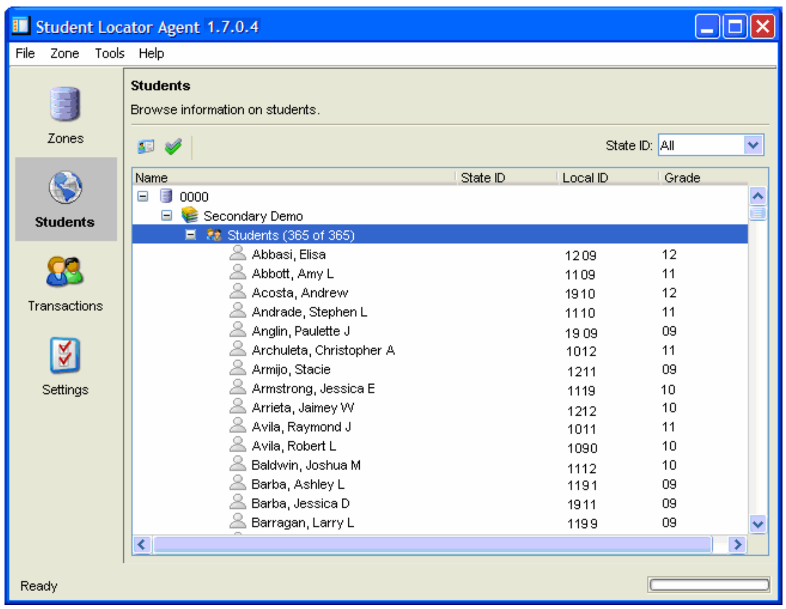
Requesting a State ID

Now that the synchronization is finished, you will need to request the first set of State IDs manually. Each request in Student Locator is called a "transaction." The Student view allows you to send single or multiple student transactions. You can also request State IDs for a single or multiple schools at one time.

Note: The Student Locator Agent will request State IDs automatically for any new students added to the SIS after the initial synchronization completes.

To manually request State IDs within the Student view

1. Open the Student view



2. Expand the district for the schools or students for which you want to request State IDs.

3. Highlight the schools or student for which you are requesting a State ID.

Note: You can highlight multiple selections by clicking those selections while pressing the Control (Ctrl) or Shift keys. On Macintosh computers, use the Command (Apple) key instead of Control.

4. Click the Request ID button ( ) or right-click the selection and click **Request ID**.

5. Confirm the request and click **Yes**.

Ready to Go

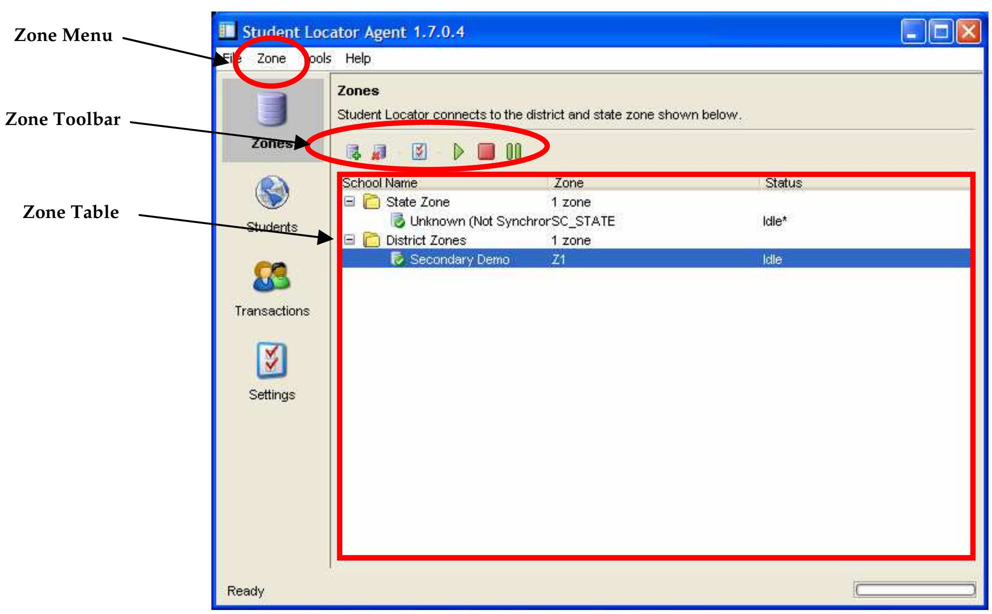
The Student Locator Agent is now ready to request State IDs automatically. When new students are added to the SIS, the Student Locator Agent will request their State IDs based upon their event and the Transaction settings. (See Obtaining Student IDs for New Students Automatically on page 22 for more information.)

4. Reference

The Reference section contains a complete description of each feature and screen within the Student Locator Console.

Zones View

The Zones view allows you to manage any zones to which the Student Locator Agent is connected. The Zone view consists of the Zone Table, the Zone Menu, and the Zone Toolbar.



However, before discussing each part of the Zones view, we will review what a zone is.

Zones Defined

A zone is a group of applications and agents that are controlled by a Zone Integration Server (ZIS). There are two types of zones in Student Locator, State zones and District/School zones. A State Zone is a zone that the Student Locator Agent and Student Resolver Agent use to communicate with one another. The Student Resolver Agent, which is installed at the state level, connects to a single state zone to service SIF Requests received from districts.

A District/School Zone is a zone that allows multiple agents to communicate with one another including Student Locator. All communication made between the Student Locator Agent and the SIS is accomplished through a District/School zone. The Student Locator Agent, which is installed at each district, connects to **both** the local district zones and the State Zone.

> Note: this document refers to "district zones," even though those zones may represent the data from the entire district, individual schools, or an aggregation of schools. The Student Locator agent can connect to multiple zones and can determine where to send messages based on the school associated with the data.

Zone Table

The Zone Table lists all zones to which the Student Locator Agent is connected. Zones are listed by State and District, and the District Zone folder can contain multiple district zones. The Zone Table lists the School Name associated with the zone, the zone's name, and the zone's current status for each zone.

Zones Menu

The Zone menu contains options for managing zones connected to the Student Locator Agent. The options in the Zone menu are disabled unless a zone which you want to manage is highlighted. The following lists the option with a brief description of what the option does:

Menu Item	Description
Connect	Enables a zone that is disconnected or asleep.
Disconnect	Disconnects a zone that is currently active.
Control	Allows you to temporarily disable (Sleep), re-enable (Wake Up), Ping, or Unregister a zone.
Zone Settings	Opens the Zone Settings dialog and allows you to change zone settings such as Transaction settings, default e-mail, and school year to name a few.

Zone Toolbar

The Zone toolbar contains icons for performing tasks within the Zone view. Some of the icons are disabled unless a zone which you want to manage is highlighted. The following lists the icon, its option, and a brief description of that option.

> **Warning:** Do not change zone settings unless instructed to do so by a System Administrator or your customer support department.

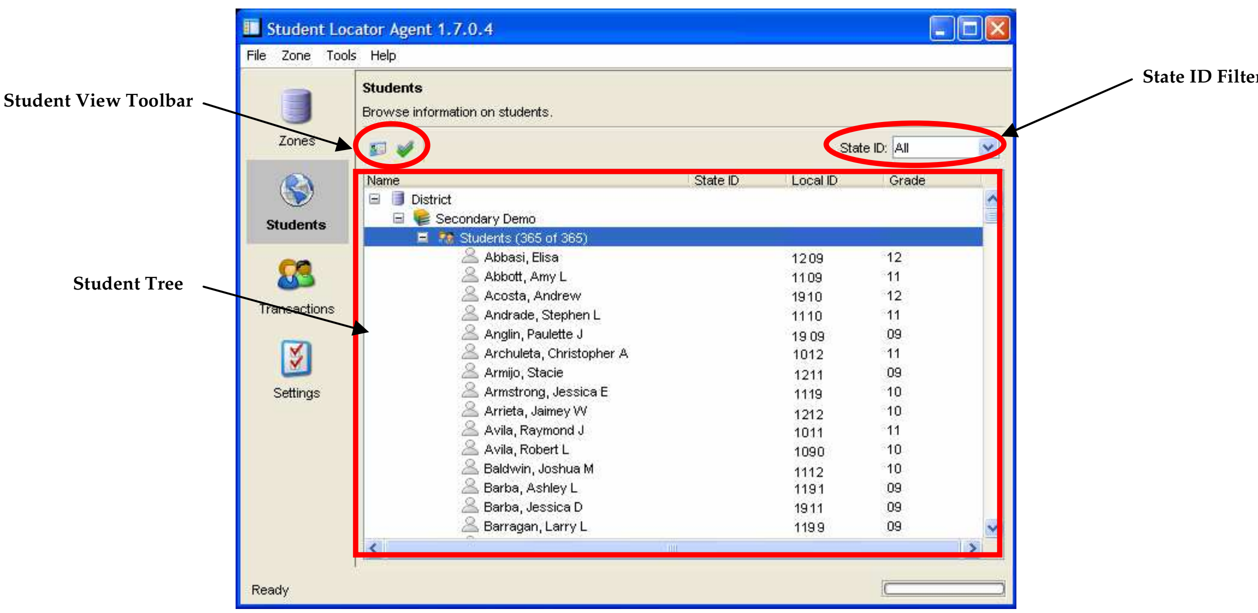
Icon	Toolbar Item	Menu Equivalent	Description
	New Zone	**File** > **New District Zone…**	Allows you to create a new zone from Student Locator.
	Delete Zone	**File** > **Delete Zones…**	Allows you to delete a zone from Student Locator.
	Zone Settings	**Zone** > **Zone Settings…**	Opens the Zone Settings dialog and allows you to change zone settings such as Transaction settings, default e-mail, and school year to name a few.
	Connect or	**Zone** > **Connect**	Enables a zone that is disconnected or

Icon	Toolbar Item	Menu Equivalent	Description
	Wakeup Zone		asleep.
	Disconnect Zone	**Zone** > **Disconnect**	Disconnects a zone that is currently active.
	Put Zone to Sleep	**Zone** > **Control** > **Sleep**	Temporarily disables a zone (that is, puts it to sleep).

Students View

The Students view allows you to manually request State IDs for one or more students. In the Students view, students are organized by Districts, Schools, and Students. You can request State IDs with either the Students view toolbar or with the context menu (right-click). You can also use the State ID filter to display only those students with or without State IDs.

The Students view consists of the Student Tree, the State ID Filter, and the Student view Toolbar.



Student Tree

The Student Tree lists all of the districts, schools, and students that have been synchronized with the Student Locator Agent. (For more information on Synchronization, see Synchronizing Student Locator in the Student Locator Overview Guide.) Each student has his/her name, State ID, Local ID and Grade listed in the Student Tree. If there are no names or districts listed in the Student view, run the Synchronization Wizard.

State ID Filter

The State ID Filter allows you to view only those students with or without a State ID. When the filter is active, Student Locator only takes action with those districts, schools, and/or students displayed in the Student Tree. (For example, if the “With State ID” filter is active, Student Locator will only act on those students with a State ID in Student Locator.)

No State ID — Displays all students with no State ID present. The No State ID option is useful to view and easily request State IDs for all students without a State ID.

With State ID — Displays all students with a State ID assigned. The With State ID option is useful to view and easily return only those students with State IDs back to the SIS.

Student View Toolbar

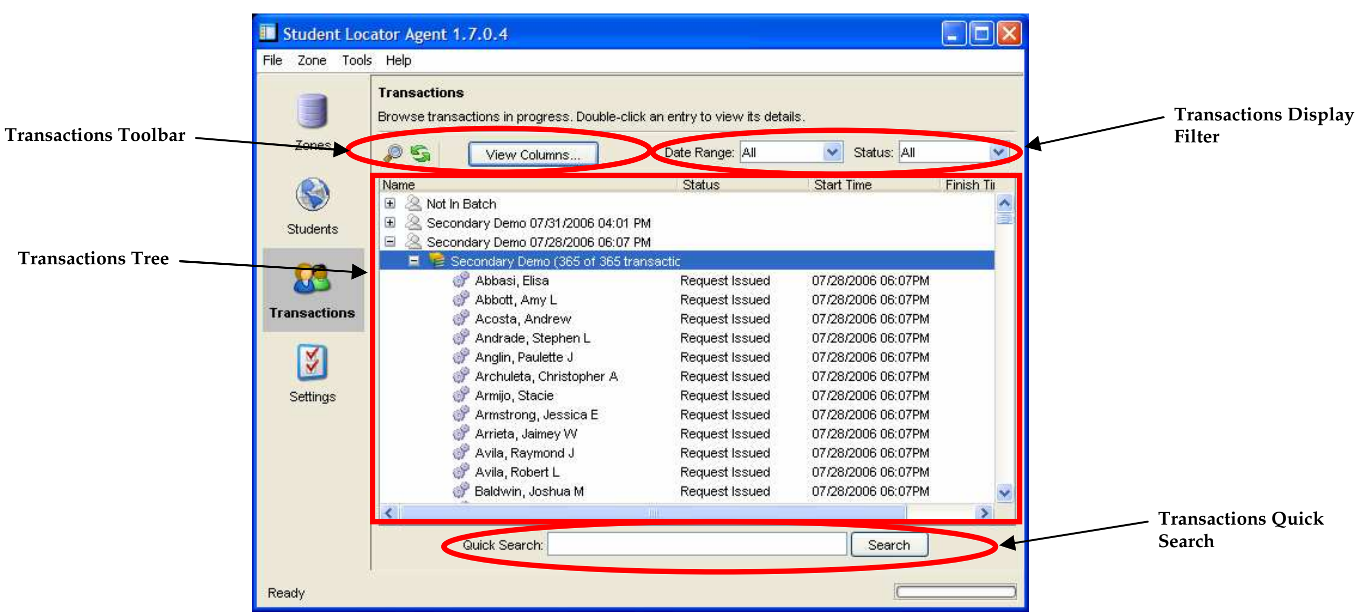
The Student view toolbar contains icons for requesting State IDs ( ) or for sending the State ID from Student Locator to the Provider Agent (i.e., the SIS) ( ). When you are manually requesting State IDs, you can highlight the student name(s), schools, or districts for whom you are requesting a State ID(s) and click the Request State ID icon.

Note: You can highlight multiple selections by clicking those selections while pressing the Control (Ctrl) or Shift keys. On Macintosh computers, use the Command (Apple) key instead of Control.

Transactions View

The Transactions view allows you to view and manage requests made for State IDs. Statuses are listed in the Status column of in the Transactions window. (For a list and definition of statuses, see Status Definitions on page 23.) You can also double-click a transaction to view any errors that may have occurred.

The Transactions view consists of the Transactions Tree, Transactions toolbar, Transactions Display Filter, and Transactions Quick Search.



Transactions Tree

The Transactions Tree displays all of the current transactions for Student Locator. The transactions are listed in a hierarchy by group of transactions, school, and student. The Transactions Tree can have up to six columns displayed at a time (depending on the settings in the View Columns option). These columns are Name, Status, Local ID, State ID, Start Time, and Finish Time.

Transactions Toolbar

The Transactions Toolbar contains icons for Advanced Search ( ) and Refresh ( ), as well as a View Columns button.

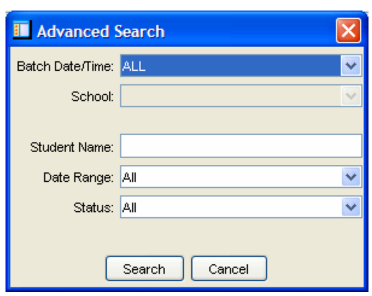
Advanced Search — The Advanced Search option allows you easily to find student transaction by Batch Time/Date, School (within the batch), Student Name, Date Range, and/or Status. You can search for complete names or partial names. For example, if you wanted to see all students named "Johnson," you would enter "Johnson" into the Student Name field and click **Search**.

To perform an Advanced Search:

1. Click **Transactions** on the left menu.

2. Click the magnifying glass ( ) to the left of the View Columns button.

   Note: You can also access Advanced Search from the Search Results window.

3. Select the advanced criteria from the dropdown menus.

4. Click **Search** to complete the Advanced Search.

Refresh — The Refresh Button refreshes all transactions in the Transaction view and displays the latest transaction history. When new batches or transactions are sent while viewing Transactions, those transactions will not display in some cases until you refresh the view. To refresh the Transactions view, click the refresh button ( ).

View Columns — View Columns allows you to display only the column information you need in the Transaction Tree. The options for view columns are Status, Local ID, State ID, Start Time, and Finish Time.

To change the column view in either Resolver or Locator:

1. Click the **Transactions** option on the left menu.

2. Click **View Columns**.

3. Check the columns to display or uncheck the columns you want to hide.

4. Click **Apply**.

Transactions Display Filter

The Transaction Filter categorizes your transactions by Date Range or Status. The Transaction Filter allows you to instantly display only the group of transactions in which you are most interested. For example, if you want to only view In Progress transactions, you can display only the transactions with an In Progress status.

To activate the Transaction Filter in either Resolver or Locator:

1. Click **Transactions** from the left menu.

2. Select a status from the either or both the Date Range and/or Status filters.

3. To remove the filter, select **All** from the filter dropdown menus.

Note: The following table describes the date range filter options:

Date Range	Description
Today	The transaction begins or ended today.
Yesterday	The Transaction began or ended yesterday.
Past 2 Days	The transaction began or ended either yesterday or today.
This Week	The transaction began or ended within the last seven (7) days.
Last Week	The transaction began or ended between 14 and 7 days ago.
Past 2 Weeks	The transaction began or ended within the last 14 days.
This Month	The transaction began or ended between the first day of the current month and today.
This Year	The transaction began or ended between the first day of the current year and today.

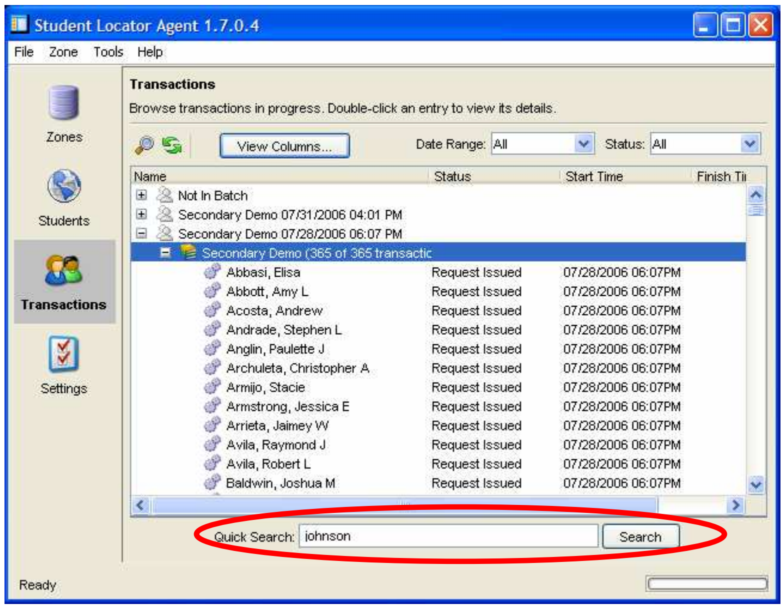
Transactions Quick Search

The Quick Search feature allows you to quickly search for student transactions. With the possibility of sorting through thousands of transactions in a day, the search makes finding specific transactions easy.

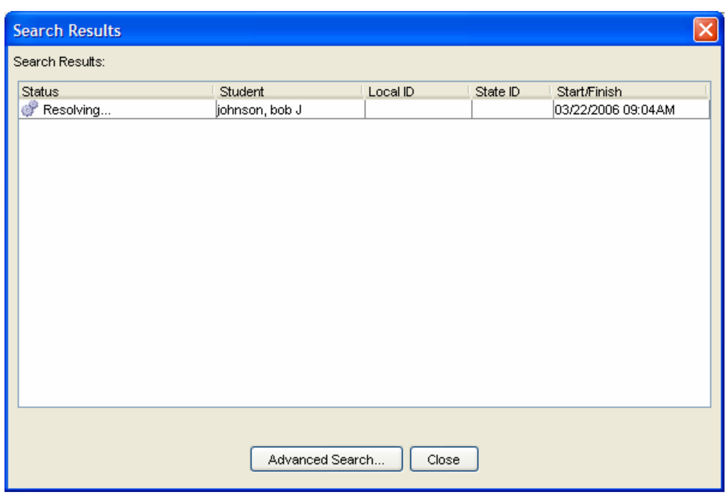
To perform a Quick Search:

1. Click **Transactions** on the left menu.

2. Enter the student's name, local ID, or state ID in the Quick Search field.



3. Click **Search**. The search results are displayed in the Search Results window.

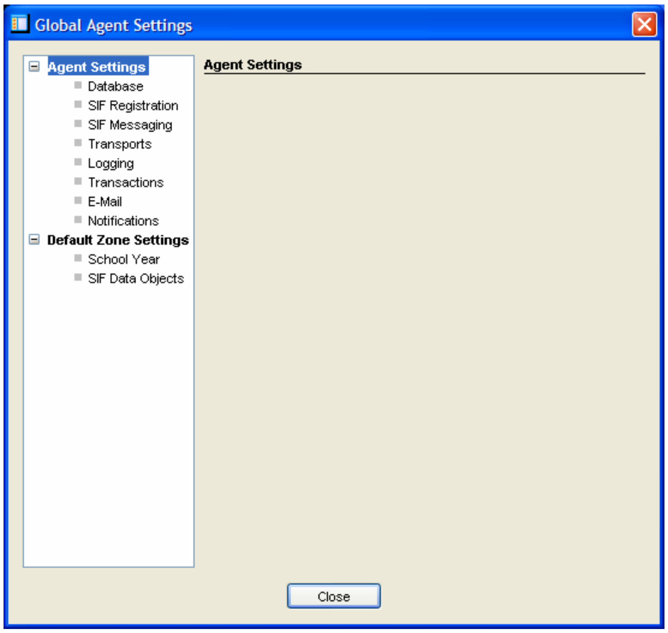


4. From the Search Results dialog, you can view a student's transaction status by double-clicking that student. If you need to narrow your search

results, you can click **Advanced Search** and enter other parameters for the search.

Settings

The Setting view contains settings for the Student Locator Agent, including database settings, transports settings, default zone setting, and so forth. From the Settings view, you can change the Student Locator Agent's settings and affect how the Student Locator Agent interacts with the zone and the database.



Note: Since these types of changes are not intended for basic use of the Student Locator Agent, we will not cover Settings in this document. If you feel you need to change the Student Locator Agent's settings, please contact your System Administrator or customer support department.

5. How to…

Obtain IDs for Students

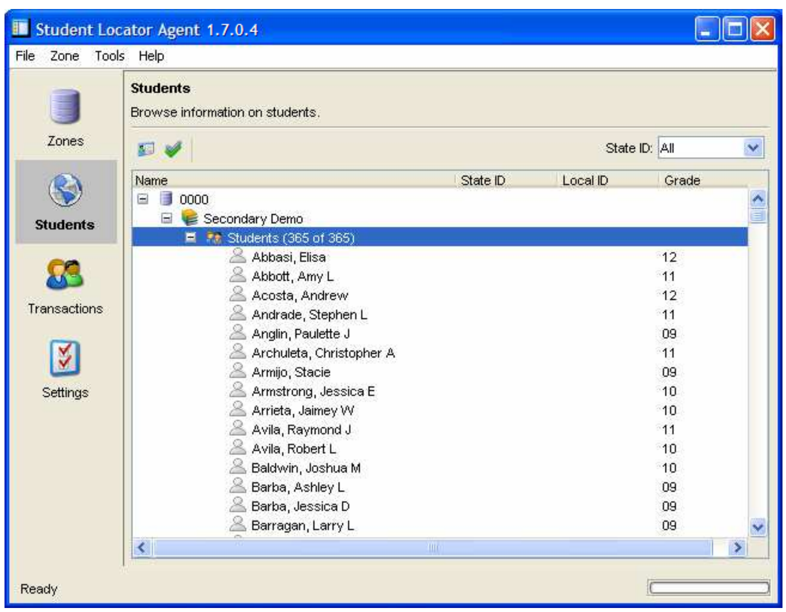
Each request for a State ID is called a transaction. Transactions are sent automatically for new students. You can also send transactions manually from the Student view for students that are already in the Student Locator Agent.

Requesting State IDs Manually

You can manually request State IDs through the Student view. The Student view allows you to send single or multiple student transactions. You can also request State IDs for single or multiple schools at one time.

To request State IDs within the Student view

1. Open the Student view



2. Expand the district for the schools or students for which you want to request State IDs.

3. Highlight the schools or student for which you are requesting a State ID.

Note: You can highlight multiple selections by clicking those selections while pressing the Control (Ctrl) or Shift keys. On Macintosh computers, use the Command (Apple) key instead of Control.

4. Click the Request ID button () or right-click the selection and click **Request ID**.

5. Confirm the request and click **Yes**.

Obtaining Student IDs for New Students Automatically

The Student Locator Agent automatically requests State IDs for new students that are added to the SIS according to the default Transactions settings located in the Global Agent Settings dialog. For example, when new student information is entered into the SIS, Student Locator will request a State ID.

There are three possible Transaction settings:

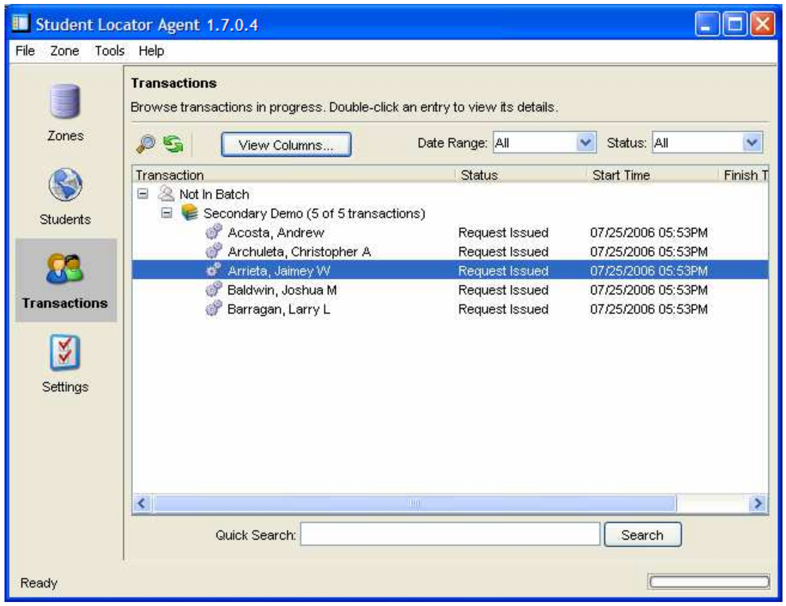
- Wait for all required data elements
    - With this option, the Student Locator Agent waits for all of the required student information to be entered into the SIS before requesting a State ID. The required student information is:
        - First Name
        - Last Name
        - Local ID (Student Number)
        - Grade
        - School Number
        - School Year
        - Gender
        - Ethnicity
        - Date of Birth
- Wait for one StudentPersonal and StudentSchoolEnrollment Add event
    - With this option, the Student Locator Agent waits for a student to be added to the SIS and then enrolled into school before requesting a State ID.
- Wait for StudentPersonal and StudentSchoolEnrollment Add events, followed by a StudentPersonal Change event.
    - With this option, the Student Locator Agent waits for a student to be added to the SIS and enrolled into school. The Student Locator Agent then waits for the student information to change (that is, the student record in the SIS is added to or edited) before requesting a State ID.

Check Transactions Status

You can easily check the transaction status of each student from the Transactions view. Statuses are listed in the Status column of in the Transactions window. You can also double-click a transaction to view any errors that may have occurred.

To check transaction status:

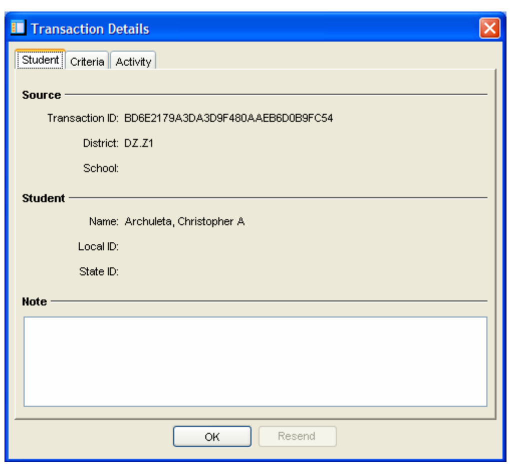
1. In the Student Locator Console, click the Transactions button () in the left menu.



2. Expand the batch and school nodes.

   The Console displays statuses in the Status column (2nd column from the left by default). For more information on statuses, see the *Status Definitions* section below.)

3. For more status information, double-click the student for which you want to view his/her status.



4. The "Notes" section will display any errors that occurred during the transaction. If the transaction is complete, the Criteria and Activity tabs will display detailed information on the transaction.

Status Definitions

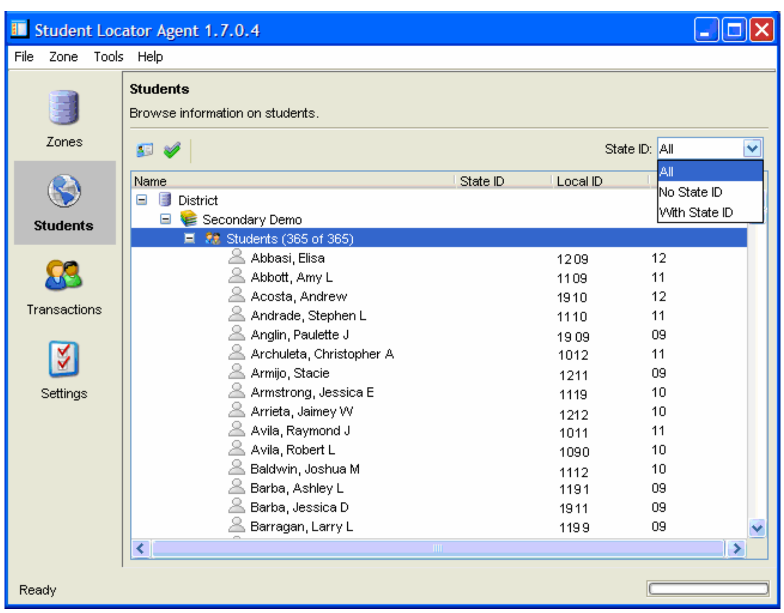
The following table contains Student Locator statuses as displayed in the Transactions view and their respective definitions:

Student Locator Statuses

Status	Definition
Starting…	A student has been added to the district Student Information System (SIS), but there is not enough information to submit.
Request Issued	The student record was submitted to the state zone.
Complete	An ID was issued by the State ID Management System and returned to the Locator agent for delivery to the SIS. This status contains all types of completions.
User Matching	The State ID Management System returned a "Near Match" list. You must log into the state web application to resolve the Near Match.
User Fixing Error	The State ID Management System returned an Error. You must correct the problem in the district or school SIS.
User Fixed Error	The SIS has published a change event to a student that was previously in the "User Fixing Error" status, and Student Locator will automatically resubmit the student to see if the data change will allow the State ID Management System to process that student's record.
User Resend	The Resend button in an individual transaction window was clicked. To see an individual transaction window, double-click that transaction in the Transactions view.

View Students without State IDs

When viewing students in the Student Locator Console, you can filter the students by those with State IDs and those without State IDs. (The State ID filter is located in the top right-hand corner of the Student view.)



Click **No State ID** to display only those students with an empty State ID field. Click **With State ID** to display all students with a State ID in the State ID field. Click **All** to display all students, with or without State IDs.

Request State IDs Again

At times, you may need to request State IDs that were already requested. Some reasons to request State IDs again may be because of errors or inaccurate State ID information. There are two ways to re-request State IDs, through the Transactions view or through the Students view.

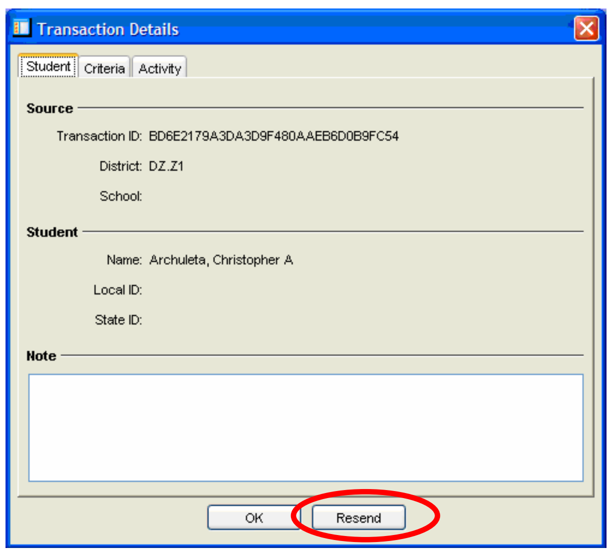
To re-request State IDs through the Transactions view:

1. Click **Transactions** from the left menu.

2. Find the transaction folder that contains the student(s) for which you are re-requesting a State ID(s) and expand that node.

3. Double-click the transaction you want and click **Resend**.

> Note: the **Resend** option is only available if there was an error with the transaction or the transaction completed successfully.



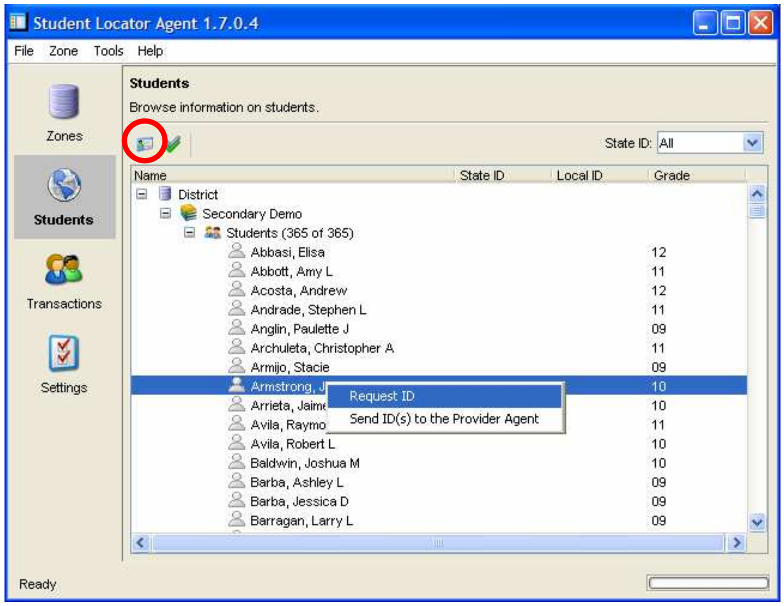
To re-request State IDs through the Students view:

1. Click **Students** from the left menu

2. Right-click the student(s) and click **Request IDs**.

   OR

   Highlight the students and click the Request ID button ( ).



Resend State IDs to the SIS

This option allows you to resend State IDs to the SIS. Although this is a valuable feature, you should not use this feature unless you need to repopulate the SIS with the State IDs. When working properly, the Student Locator Agent automatically passes the State ID to the SIS after receiving the ID from the Student Resolver.

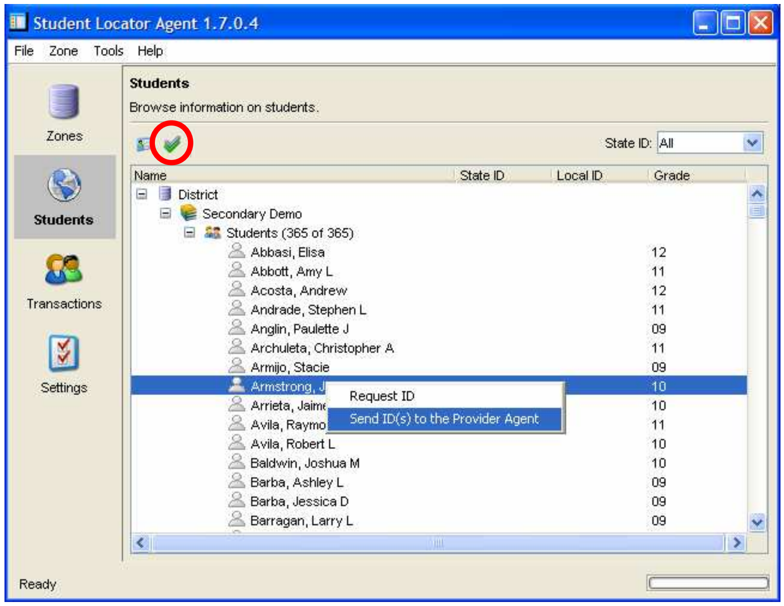
To resend State IDs to the SIS

1. Click **Students** in the left menu

2. Right-click the student(s) and click **Send IDs to Provider Agent**

   OR

   Highlight the student(s) and click the Send IDs to Provider Agent button (✔).


Student Locator Agent 1.7.0.4
File Zone Tools Help
Zones
Students
Transactions
Settings
Students
Browse information on students.
State ID: All
Name
State ID
Local ID
Grade
District
Secondary Demo
Students (365 of 365)
Abbasi, Elisa 12
Abbott, Amy L 11
Acosta, Andrew 12
Andrade, Stephen L 11
Anglin, Paulette J 09
Archuleta, Christopher A 11
Armijo, Stacie 09
Armstrong, J 10
Arrieta, Jaime 10
Avila, Raymo 11
Avila, Robert L 10
Baldwin, Joshua M 10
Barba, Ashley L 09
Barba, Jessica D 09
Barragan, Larry L 09
Request ID
Send ID(s) to the Provider Agent
Ready

6. Appendix A — Advanced

Start and Stop a Service

When the Student Locator Agent is run as a service, there are times you may need top start or stop the service.

How to start a service in Windows:

1. Open **Start > Control Panel > Administrative Tools > Services**.

2. Locate the Student Locator service. (named “SIF Student Locator”) Services are listed with name, description, status, etc. The Status field displays whether or not the service is started, paused, or stopped. It the service is stopped, the Status field is blank.

3. If the status is blank or paused, highlight the Student Locator service and click **Start**. You can also right-click the service and click **Start**.
   The service status will change to *Started*.

4. Close Control Panel

How to stop a service in Windows:

1. Open **Start > Control Panel > Administrative Tools > Services**.

2. Locate the Student Locator service. (SIF Student Locator)
   Services are listed with name, description, status, etc. The Status field displays whether or not the service is started, paused, or stopped. It the service is stopped, the Status field is blank.

3. If the status is anything other than blank, highlight the service and click **Stop**. You can also right-click the service and click **Stop**.

4. Close Control Panel.

Transaction Settings for New Students

The time a transaction is sent for new students is determined by the Student Locator settings. There are three options for starting a new transaction:

- Wait for all required data elements

- Wait for one StudentPersonal and StudentSchoolEnrollment Add event

- Wait for StudentPersonal and StudentSchoolEnrollment Add events, followed by a StudentPersonal Change event.

Wait for all required data elements

A transaction for a new student is not sent until all required data elements are received from the SIS. The required data elements are:

- First Name
- Last Name
- Local ID (Student Number)
- Grade
- School Number
- School Year
- Gender
- Ethnicity
- Date of Birth

Wait for one StudentPersonal and StudentSchoolEnrollment Add event

A transaction for a new student is not sent until that Student's Personal information AND school enrollment information are received from the SIS. For example, if Student A's information is received by the Student Locator Agent from the SIS, a transaction is NOT sent until Student A's enrollment information is also received from the SIS.

Wait for StudentPersonal and StudentSchoolEnrollment Add events, followed by a StudentPersonal Change event.

A transaction for a new student is not sent until that student's personal information and school enrollment information are received from the SIS, and THEN, a change to that student's information is received from the SIS. For example, if Student A's personal information and school enrollment information are received from the SIS, a transaction is NOT sent until a change is made to Student A's personal information in the SIS and that change request is received by the Student Locator Agent.

Future Enrolled Students

Future Enrollment settings allow you to specify when you want the Student Locator Agent to process Future Enrollments received from the Student Information System (SIS). There are two options in the Future Enrollment settings:

- Process future-enrolled students on receipt

- Process future-enrolled students on the effective date

Process future-enrolled students on receipt

This is the recommended default setting. When this option is selected, the Student Locator Agent will start a transaction for new students with a future enrollment date as soon as the demographic and enrollment data is received from the SIS. For example, if a student is pre-enrolled by the SIS administrator on

June 5th but is given an effective date of August 15th, the Student Locator Agent will start a transaction for that student in June, as soon as it has received all necessary data from the SIS.

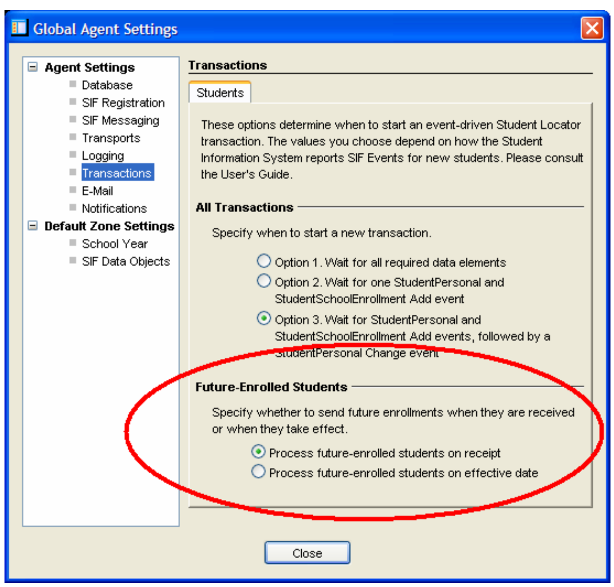
Process future-enrolled students on the effective date

When this option is selected, the Student Locator Agent will gather demographic and enrollment data for new students with a future enrollment date but will not issue a transaction until the effective date occurs. For example, if a student is pre-enrolled by the SIS administrator on June 5th but is given an effective date of August 15th, the Student Locator Agent will not start a transaction for that student until August 15th. Consequently, the earliest this student will receive a State ID is August 15th.

Warning: You should only change the default setting when instructed by your state's support channel or Edustructures Customer Support.

To access Future Enrollment Settings:

1. Open the Student Locator Console.
2. Click **Settings** on the left menu.
3. Click **Transaction** under the Agent Settings node.



4. Select the Future Enrollment option you want and click **Close** when finished.

Note: Whenever the Student Locator Agent is synchronized, Future-Enrolled students are immediately transferred to the Student Locator Agent's database regardless of the settings for Future-Enrolled students.

Unsynchronize

The Unsynchronize feature removes student information from the Student Locator Agent's database.

Note: You should not unsynchronize unless instructed to do so by your System Administrator or customer support department.

To Unsynchronize a zone:

1. Click **Tools > Unsynchronize…**.

2. Select the zones you want to unsynchronize by clicking the checkbox next to the zone.

3. Click **Unsynchronize**.

Transaction

A transaction is a request for a single State ID for one student. Larger transactions (for example, entire schools) are sent in "batches" and can be tracked through the Transactions view. Transactions are initiated from the Student Locator Agent automatically for new students received from the student information system via SIF Event Reporting. You can also request transactions manually from the Student view in the Console. Transactions are considered "complete" when the Student Locator Agent receives a response from the Student Resolver Agent.

Transaction Outcomes

There are four possible outcomes for a transaction:

Match — A matching student was found and a State ID was returned to the district. The Student Locator Agent passes the State ID to the SIS and other subscribing applications. No user intervention is required.

Ambiguous — More than one match was found given the supplied criteria and a list of candidates is returned to district staff via an e-mail message. The district staff must resolve the ambiguity outside of the SIF infrastructure (for example, via a web interface to the data warehouse). Once the ambiguity is resolved, the

Student Resolver Agent automatically returns the resolved State ID to the district's Student Locator Agent, which then passes the State ID to the SIS.

New — The data warehouse assigned a new State ID to the student. The Student Locator Agent passes the State ID to the SIS and other subscribing applications. No user intervention is required.

Insufficient or Incorrect Data — The Student Locator Agent passed insufficient information or incorrect data in its original request. An example of incorrect data would be an ethnicity code other than those specified by the state office. In this case, district staff are notified via e-mail and asked to correct the problem in the SIS. When the SIS sends the updated information to the Student Locator Agent, the Student Locator Agent will retry the State ID request as a new transaction.

Multiple Transactions (Batch)

You can send multiple transactions from the Student view. When there are multiple districts and/or schools requested these are sent together and called a Batch Transaction. Selecting multiple students sends individual transactions for each student. In the Transactions view, these are stored in the "Not in Batch" folder.

Note: You can highlight multiple selections by clicking those selections while pressing the Control (Ctrl) or Shift keys. On Macintosh computers, use the Command (Apple) key instead of Control.

Zones

State Zone

The State Zone is the zone that the Student Locator Agent and the Student Resolver Agent use to communicate with one another. The Student Resolver Agent, which is installed at the state level, connects to a single state zone to service SIF Requests received from districts. The Student Locator Agent, which is installed at each district, connects to **both** the local district zones as well as the State Zone.

It is worth noting that one benefit of this arrangement is that states do not have to manage district zones, which greatly improves scalability and manageability. Districts are simply given the URL to the state zone where that district's Student Locator Agent connects.

District/School Zone

This document refers to the zones that exist at a district as "district zones", even as they may represent the data from the entire district, individual schools, or an aggregation of schools. The Student Locator agent can connect to multiple zones and can determine where to send messages based on the school associated with the data.

Communication over the district zone is typically HTTP over Push mode as it occurs within the district LAN.

District zones may already exist for horizontal integration. The Student Locator does not require districts to establish local zones for the express purpose of conducting Student Locator services with the state.

Hierarchical View of Transactions

The hierarchical view of transactions allows you to better manage transactions within the Student Locator Console. The hierarchical view makes it easier to sort, filter, and view transactions. In the Student Locator Console, the hierarchy displayed is **District > School > Student Transaction**.